# EDUCATION

Bachelor Degree of Business Administration, University of Western Sydney

Diploma of Business Management, Hong Kong Baptist University

Higher Certificate of Secretarial Studies, Hong Kong Baptist University

# WORKING EXPERIENCE

# Oct 2016 – Oct 2017 UBS AG,

# Executive Assistant to Head of ECM

* Organize meetings and conference calls in global time zone, including availability check, facilities arrangements and prepare of meeting materials
* Handle a large volume of travel bookings in accordance with Bank's Travel Policy and maintain travel records. Calendar manage for Head of ECM and Bankers
* Maintain project data portal by uploading the Call Report, File Note and materials to the SharePoint.
* Process vendor invoice, Travel & Entertainment reimbursement through system within monthly cutoff and ensure project code is booked properly.
* Handling staff on-boarding and off-boarding matters to ensure proper arrangement is made

# Sept 2015 – Nov 2015 Fidelity Investment Management (HK) Limited

# Executive Assistant to Head of Institutional Business, Asia

* Responsible for heavy calendar management. Prioritize and schedule of meetings, conference calls, video conferencing and appointments with internal and external business contacts.
* Planning and arranging extensive business travel. Consolidate and prepare of Monthly Country Report and set up of review meeting with respective Market Heads
* Logistic arrangements and on-site support of client events e.g. Market Outlook Seminar and Training Day for major clients on regular basis
* Handling a large variety of information and disseminating to the responsible Function Heads for immediate action.
* Work closely with Research Team to prepare of high standard pitch book and other marketing materials.

# Jun 2010 – Aug 2015 ANZ Private Bank

# Executive Assistant to Head of Private Bank, North Asia

* Coordinate complex schedule both business and personal; plan and manage busy calendar in order to set priorities for the day; maintain the day-to-day business activities as scheduled; take care of extensive travel arrangements and arrange itineraries
* Prepare of PowerPoint slides/meeting deck and ensure all meeting materials and facilities are prepared and distributed ahead the meeting eg. EXCO Meeting, Global Wealth Leadership Team Meeting, Risk Control Meeting, Business Performance Review
* Organize Staff Townhall / Global Wealth Executives visit, Marketing Event and Investment Outlook Luncheon. e.g. venue book, prepare and confirm invitations and provide on-site supports
* Act as a business unit focal contact point and work closely with business stakeholders eg. HR, Legal & Compliance, Finance, Property Administration in various departmental matters
* Assigned as a Licensing Coordinator. Work closely with Compliance Team on HKMA/SFC License Registration, maintain CPT Training record. Review and preserve record of staff securities trading on regular basis
* Monitoring of Travel Register in related to off-shore activities and in line with Rule of Engagement. Maintain Gift and Entertainment Register to comply with Bank’s policies
* To ensure the smooth running of office operation. Handling and involving in Internal Audit, Quality Assurance test, coordinate internal and external trainings for PB staff members

# Jan – Jun 2010 Deutsche Bank, Distressed Products/Private Equity Group

# Assistant to Head of Principal Investments, Asia (Contract employment)

* Provide full range of executive and secretarial supports
* Responsible for the relocation of Head of Principal Investment and his family to New York. Work closely with HR & Expatriate Administration Team and Consultancy Firm to ensure that all logistics are fully arranged to facilitate the move
* Assist a team of investment professionals to maintain “Intralink” - Global Investment logging system for status update
* Update and maintain Business Continuity Plan, coordinate holiday schedule and whereabouts of the team to ensure no operational outage

# Sep 2006 – Apr 2009 SG Private Banking

# Personal Assistant to CEO, Hong Kong & North Asia

* Provide all-rounded secretarial duties to CEO in a professional manner. Perform advanced administrative support functions and handle of confidential documents. Involved in UHNW client contact.
* Provide full spectrum of support by planning and scheduling complex and intensive travel schedule. Set up conference call & video conferencing across multiple time zones, partnering with assistants globally
* Prepare of meeting agenda, materials for review and discussion, and minutes taking as well as to follow up with action owners on outstanding issues
* Responsible for logistic arrangements for Executive Committees Meeting, On-site and off-site meetings and events; Staff Town Hall; including negotiate with hotels, caterers and vendors
* Consolidate data and compile reports for Management (e.g. Monthly Management Update, Regional Performance Report etc)
* Handle of travel and meeting schedule for Global CEO and other senior executives’ regular visit to the region
* Review and approve leave applications, expenses requests, resource requests as directed by the CEO
* Communicate with functional leaders and overseas offices on corporate information dissemination

# Oct 2005 – Sep 2006 The Bank of East Asia, Private Banking Division

# Personal Secretary to Head of Private Banking, Asia Pacific

* Prepare presentation and marketing materials in a professional manner and in line with the Bank’s corporate image
* Work with Marketing Heads and Investment Advisory Team to prepare monthly transactions summary and activities report in a timely and accurate manner
* Liaise with the Operations Head to update and maintain the Operation Manual and Dealing Policy Guidelines
* Control and monitor of office and marketing teams’ expenses and prepare of monthly P&L report

# Jul 2002 – Sep 2005 AIG Private Bank Limited

# Executive Secretary to Chief Representative of Private Banking, Hong Kong

* Provide high quality secretarial and administrative support to Chief Representative and Management Team
* Responsible for the application of dealing license for Private Bankers; organize courses and in-house trainings and retain records for registered licensees in order to fulfill and comply with the CPT requirements
* Client events coordination and assist in organize of Annual Investment Outlook Seminar (take care the whole logistics and facilities arrangement e.g. prepare of invitation, travel and lodging arrangements for the invited clients and bankers, provide on-site supports)
* Liaise with HKMA and internal departments on various issue on the development of branch office
* Maintain and monitor the cross selling program with referral agents and counterparties
* Prepare Monthly Asset under Management and Trading Revenue Report to the Headquarters
* Supervise administrative staff to responsible for departmental HR and office administration functions

# Jul 2000 – Jun 2002 ABN AMRO Asia Capital Investment Limited

# Secretary to CEO, Chairman of HK Venture Capital Association

* Provide full spectrum of professional secretarial support to the management and handle all personal matters as required
* Facilitate meetings including compilation and dissemination of meeting agenda, minutes and any other meeting materials as needed
* Act as the communication channel between senior executives of regional offices and overseas business associates as well as professional bodies
* Handle highly confidential documents and information on investment projects; maintain and update of private equity status report
* Review incoming correspondence, submissions, and reports in order to determine their significance and to plan for distribution
* Organize regular functions of Hong Kong Venture Capital Association, e.g. luncheon meeting, members get together event, annual conference and seminar

# Nov 1999 – Jul 2000 Deutsche Asset Management (Hong Kong) Limited

# Executive Secretary to Regional Director

* Prioritize workload to meet deadlines and effectively manage the flow of paperwork among the group
* Liaise with Headquarters and Fund Managers in the region for clients meeting arrangement
* Prepare marketing proposal and presentation materials in a professional manner
* Update and distribute of daily fund price and portfolio summary to Institutional clients
* Act as a project owner such as office renovation, office automations upgrade and perform general office administration duties

# Mar 1991 – Feb 1997 British Telecommunication (Hong Kong) Limited

# Personal Secretary/Administrator to Regional Director of National Partners & Business Development, Asia Pacific

* Provide all round secretarial and administrative support, schedule meetings and arrange appointments
* Liaise with business contacts, government officials and worldwide offices for product launch activities
* Coordinate and manage the Business Development activities i.e. local and overseas conference, seminar and client events

# SKILLS

Softwares: Microsoft Office applications

Financial Channels: Bloomberg, Reuters, ETnet, Micropal

Written & Spoken: Cantonese, Mandarin, English

**AVAILABILITY: Immediate Available**